

## Chapter 2

### Logging On and Access

#### Chapter Overview

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**Introduction**      This chapter explains how to log on to the modern DCPDS and gain access to the functions, forms, and data necessary to do your job.

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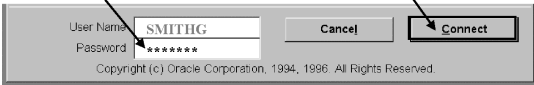


# Logging On

<b>Purpose</b>	<p>To use the modern DCPDS, you will need to:</p> <ul style="list-style-type: none"> <li>• Open the modern DCPDS application,</li> <li>• Sign on, and</li> <li>• Select a “responsibility” if you have been assigned more than one.</li> </ul>						
<b>Before You Begin</b>	<p>You will need a user account and a personal password to gain access to and use the modern DCPDS. A system administrator will set-up your account and access privileges (“responsibility” categories).</p>						
<b>Terms</b>	<p><b>Responsibility:</b> A set of access privileges for using the modern DCPDS. When a system administrator establishes your user account, you will be assigned one or more “responsibilities” so that you can access only those functions, forms, and data appropriate to do your job.</p>						
<b>Categories of Responsibilities</b>	<p>Categories of responsibilities include (but are not limited to):</p> <ul style="list-style-type: none"> <li>• HR Generalist</li> <li>• HR Specialist (by function)</li> <li>• Civilian HR Manager</li> <li>• Manager or Supervisor (non-HR)</li> <li>• Non-Appropriated Fund (NAF) HR Manager</li> <li>• System Administrator</li> </ul>						
<b>Access to Employee Data</b>	<p>Your access to employee data will be restricted based on your role and responsibility in your organization.</p>						
<b>How to Log On</b>	<p>To log on to the modern DCPDS:</p> <table border="1"> <thead> <tr> <th>Step</th><th>Action</th></tr> </thead> <tbody> <tr> <td>1</td><td>Start up your computer and log on to your local network, according to local procedures.</td></tr> <tr> <td>2</td><td>Double-click the modern DCPDS icon that is displayed on your computer’s program manager screen or follow local procedures if an icon has not been created.</td></tr> </tbody> </table>	Step	Action	1	Start up your computer and log on to your local network, according to local procedures.	2	Double-click the modern DCPDS icon that is displayed on your computer’s program manager screen or follow local procedures if an icon has not been created.
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# Logging On, Continued

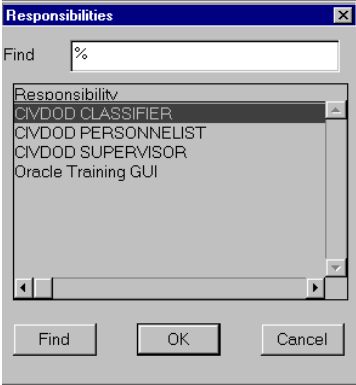
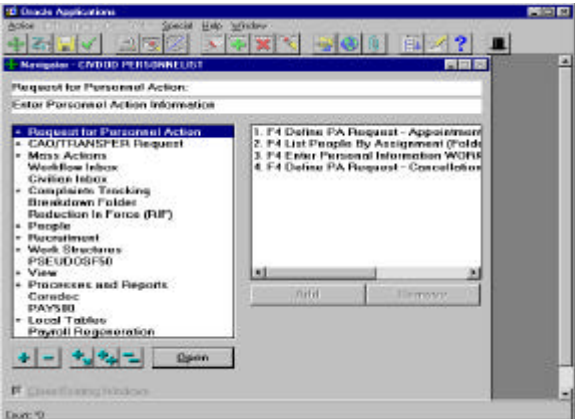
## How to Log On (continued)

Step	Action
3	<p>A log on window displays and your cursor is in the <i>User Name</i> data field.</p> <p>Type in your user name (as assigned by the local system administrator).</p> <p>.. <b>Example:</b></p> 
4	<p>Press [Tab] once to move your cursor to the <i>Password</i> data field (or use your mouse to place your cursor in the <i>Password</i> data field).</p> <p>Type in your password and click &lt;<u>C</u>onnect&gt;.</p> <p>.. <b>Example:</b></p>  <p> <b>Note:</b></p> <ul style="list-style-type: none"> <li>• Your password will not display as you type it; this prevents others from seeing it.</li> <li>• If you incorrectly type in your password, you can re-type it, but after a third try the modern DCPDS will close down and you will need to re-enter the application.</li> </ul> <p> <b>Caution:</b> Keep your password confidential to prevent unauthorized users from gaining access to the system.</p>

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## Logging On, Continued

### How to Log On (continued)

Step	Action
<p>5</p>	<p>If you have been assigned more than one responsibility, a <b>Responsibilities</b> Window will display.</p> <p>Click a <b>responsibility</b> from the choices provided and click <b>&amp;ltOK&gt;</b>.</p> <p>.. <b>Example:</b></p>  <p><b>Note:</b> The responsibility you select will determine the specific set of data, menus, and forms to which you will have access. You will only be able to select responsibilities that have been assigned to you by your system administrator (based on your job responsibilities).</p>
<p>6</p>	<p>The <b>Navigator</b> Window displays. You are now ready to begin using the modern DCPDS.</p> <p>.. <b>Example</b> (for CIVDOD Personnelist responsibility):</p> 

## The Navigator Window

### Purpose

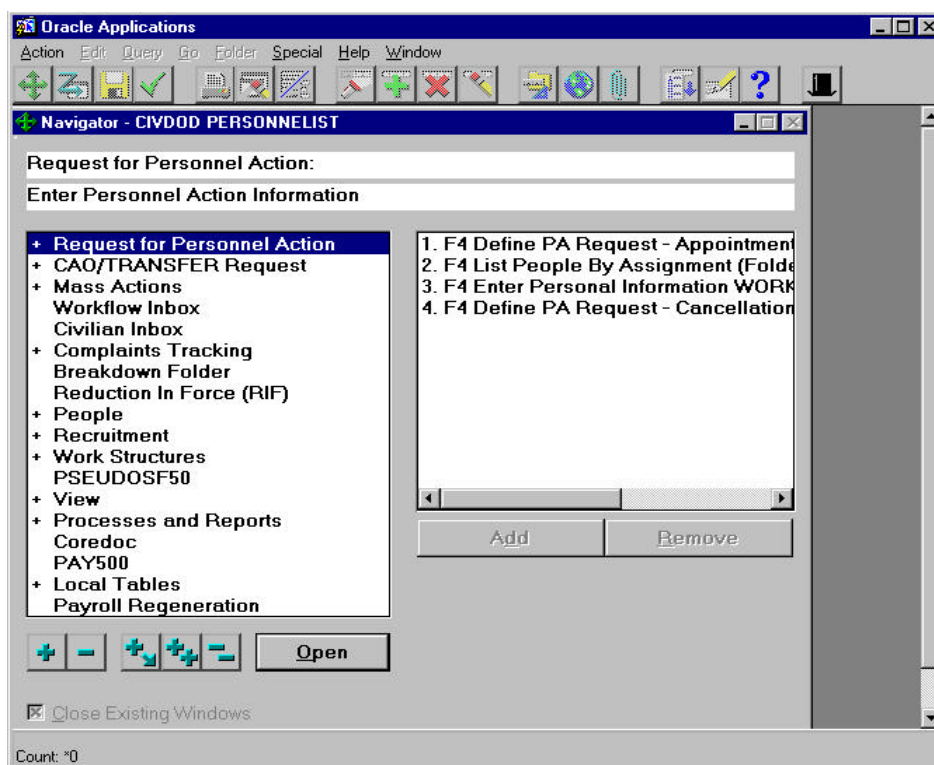
You begin working in the modern DCPDS by choosing an option from the **Navigator** Window. The **Navigator** Window displays a list of categories for the tasks you can perform in the modern DCPDS, based on the access privileges (“responsibility”) you have been assigned in a list called the **Navigation List**. If you have been assigned more than one responsibility, the **Navigation List** displayed will be for the responsibility you selected in the **Responsibilities** Window.

At the top of the **Navigator** Window you will see the name of the responsibility which you have logged on to (e.g., “CIVDOD Personnelist”).

The **Navigator** Window is always open when you are using the modern DCPDS.

### Illustration

Below is the **Navigator List** which is displayed if you log on under the “CIVDOD Personnelist” responsibility:



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## The Navigator Window, Continued

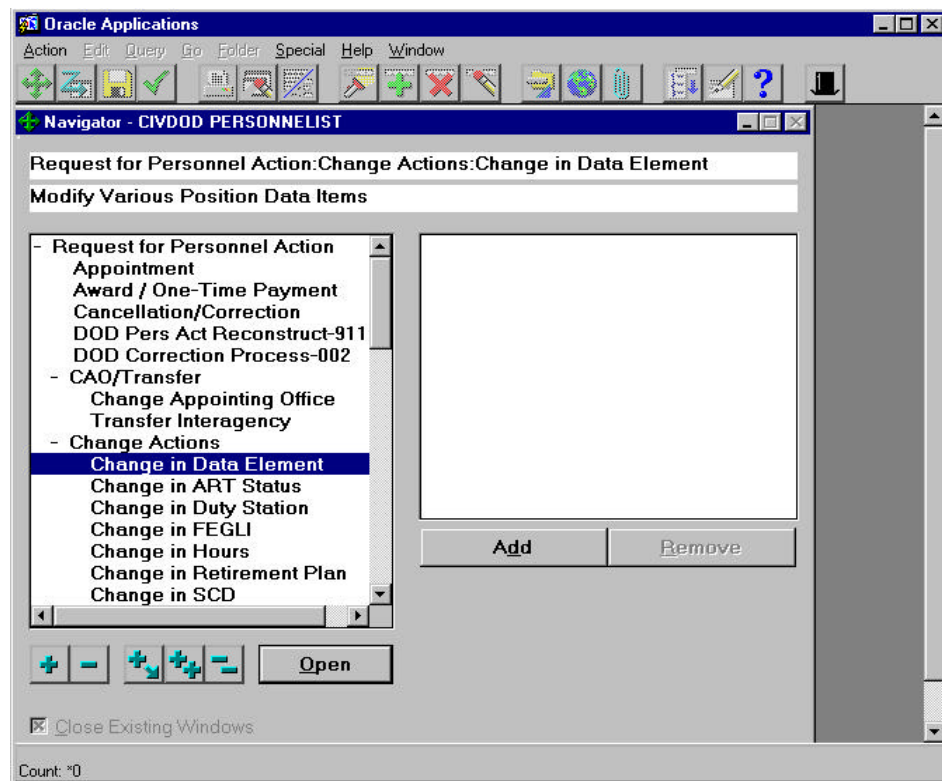
**In This Section** This section explains:

- How to find what you need from the **Navigator** Window.
- How to open windows from the **Navigation List**.
- How to create a Top-Ten List to quickly access frequently used windows.

**How the Navigation List is Organized**

Within the **Navigator** Window you will see a **Navigation List**. The **Navigation List** is organized much like the hierarchy of a file system: with main categories (levels) and subcategories (sub-levels). Upon logging on, you will see only main category items on the **Navigation List**. You can then expand items that begin with a plus sign (+) to search sub-levels until you find the area you need.

Sub-levels will display indented below the items from which they are expanded. When an item is expanded, a minus sign (-) will display next to it. You can expand an item no further if there is no plus or minus sign beside it.



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## The Navigator Window, Continued

**Terms:** Below are definitions for terms associated with the **Navigator** Window:




Term	Definition
<b>Navigate</b>	Describes the way users move around in the modern DCPDS: e.g., move from one place in the application (window, data field, etc.) to another.  .. <b>Examples:</b> “From the <b>Navigation List</b> , you can <i>navigate</i> (e.g., go) to any window you need to do your task” or “By <i>navigating</i> around the modern DCPDS, you can see where different data fields are located and become more comfortable with using the new system.”
<b>Navigation List</b>	The list of items located in the <b>Navigator</b> Window. The <b>Navigation List</b> is the starting point for everything you do in the modern DCPDS.
<b>Expand</b>	Some items in the <b>Navigation List</b> -- those preceded by a plus sign (+) - can be “expanded” to display additional items that fall under the same category.
<b>Collapse</b>	Expanded items may be “collapsed” to view only the main category.
<b>Top-Ten List</b>	To quickly find and open items on the <b>Navigation List</b> that you use frequently, you can create your own navigation Top-Ten List. The Top-Ten List you create will be located on the right side of the <b>Navigator</b> Window.

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## The Navigator Window, Continued



### Expanding Items on the Navigation List

Choose one of the following methods to expand items on the **Navigation List** (to see the items listed in sub-levels):

To...	Do this...
<b>Expand one item to its next sub-level:</b>	<ul style="list-style-type: none"> <li>• Double-click the item <i>Or</i></li> <li>• Click the item, then click <b>&lt;Open&gt;</b> <i>Or</i></li> <li>• Click the item, then click the <b>Expand</b> button: </li> <li><i>Or</i></li> <li>• Click the item, then click <b>S<u>pecial</u></b> → <b>E<u>xpand</u></b> on the Main Menu Bar.</li> </ul>
<b>Expand all sub-levels of one item</b>	Click the item once and then click the <b>Expand All Children</b> button: 
<b>Expand all sub-levels of all expandable items in the navigation list</b>	Click the <b>Expand All</b> button: 

### Collapsing an Expanded Item on the Navigation List

You may find it easier to locate the item you need on the **Navigation List** by collapsing expanded items (so you do not have to scroll through lists you do not need). To collapse an expanded item:

To...	Do this...
<b>Collapse one expanded item</b>	Click the item, then click the <b>Collapse</b> button: 
<b>Collapse all currently expanded items</b>	Click the item once, then click the <b>Collapse All</b> button: 

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## The Navigator Window, Continued

### Close Existing Windows Check Box

At the bottom of the **Navigator** Window is a check box labeled *Close Existing Windows*.



**If the check box is grayed out, the choice has been pre-selected and the option to change the selection is not available to you.**

If the check box is not grayed out, you can select this check box to open just one Navigation List item at a time, or clear the check box so you can have multiple Navigation List items open at one time.

Click the check box to toggle between select and clear. An "X" mark indicates the option to close existing windows is selected; therefore, opening a new item will close any existing open item. No "X" mark indicates the option is clear (not selected).



**Note:** Each window that you have open requires a certain amount of computing resources (e.g., memory space). If you know your computer is low on available memory, you may want to select the **Close Existing Windows** check box to avoid wasting resources.

### Opening an Item from the Navigation List

Follow the steps below to open an item from the **Navigation List** and begin using the modern DCPDS:

Step	Action
1	Select or clear the <b>Close Existing Windows</b> check box (if it is not grayed out).
2	<ul style="list-style-type: none"> <li>Click the item on the <b>Navigation List</b> you need to use, then click <b>&lt;Open&gt;</b>.</li> </ul> <p><i>Or</i></p> <ul style="list-style-type: none"> <li>Double-click the item.</li> </ul>

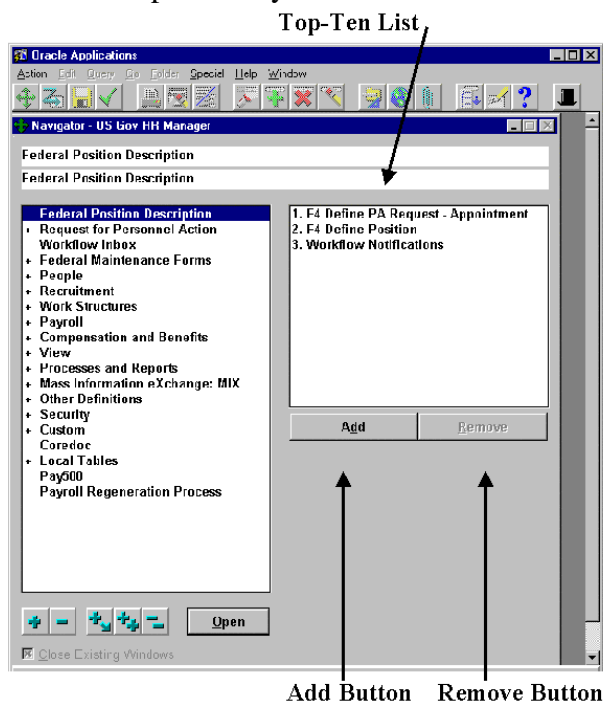
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## The Navigator Window, Continued

### Creating a Navigation Top-Ten List

To quickly find and open navigation list items you use frequently, you can create your own navigation Top-Ten List. The Top-Ten List you create will be located on the right side of the **Navigator** Window, opposite the **Navigation List**.

If you have access to more than one responsibility, you can create a different Top-Ten List for each responsibility.



### To create a navigation Top-Ten List:

Step	Action
1	Click an item from the <b>Navigation List</b> you use frequently.
2	Click <Add>. The item is now displayed in the navigation Top-Ten List, with a Top-Ten List number beside it.
3	Repeat steps 1 and 2 for the other items you want to put on your list (up to ten items).

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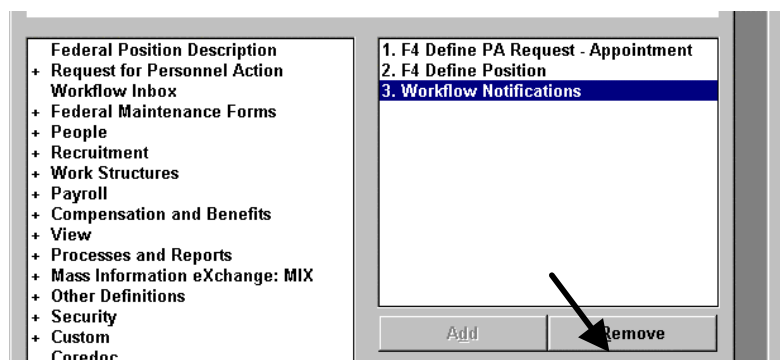
## The Navigator Window, Continued

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### Removing Items from the Navigation Top-Ten List

To **remove** an item from the navigation Top-Ten List:

1. Click the item on the Top-Ten List you wish to remove.
2. Click **<Remove>**.



### Opening an Item from the Top-Ten List

To **open** an item from the navigation Top-Ten List and begin using the modern DCPDS:

1. On your keyboard, press the number key that corresponds with the Top-Ten List number of the item you want to open.

*OR*

2. Highlight the item with your cursor and double-click.

*OR*

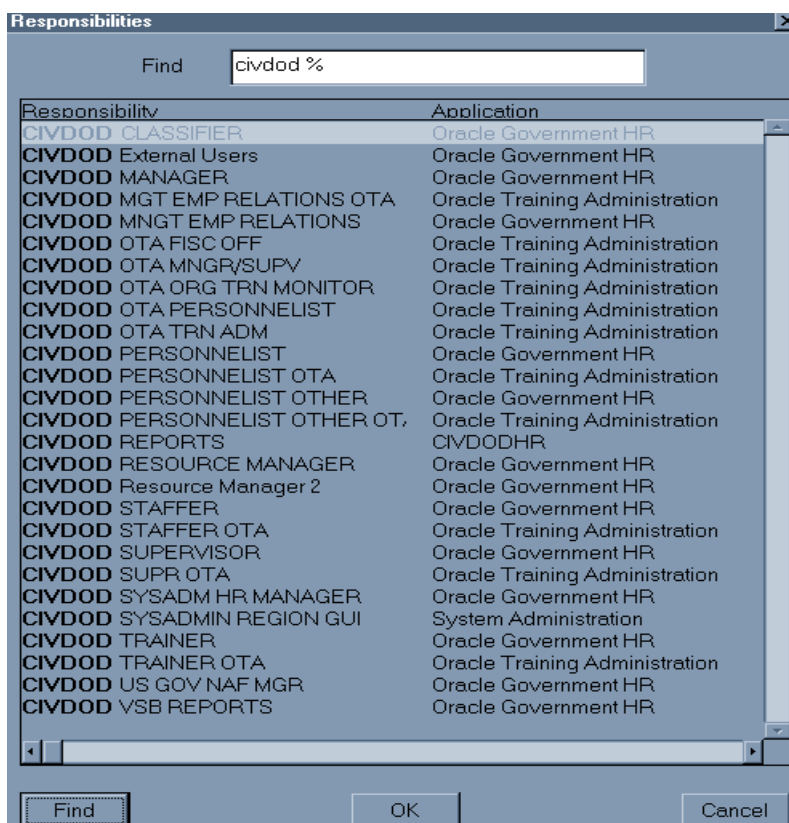
3. Highlight the item with your cursor and click **<Open>**.
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## Roles and Responsibilities

**Introduction** Modern DCPDS user roles and responsibilities are key to levels of access in the system for security purposes. Security within the system controls what menus, forms, data, and reports you can create, view, and update. Security access is set based on your role in human resource management and your responsibility for certain actions, and the records you are authorized to access. This section applies to all system users. A responsibility is basically a menu or a collection of functions the user can perform. A role is a capability, such as Request for Personnel Action approver vs. initiator or requestor.

### Human Resource Management Responsibilities

There are a number of human resource management responsibilities identified in the modern DCPDS.



Responsibility	Application
CIVDOD CLASSIFIER	Oracle Government HR
CIVDOD External Users	Oracle Government HR
CIVDOD MANAGER	Oracle Government HR
CIVDOD MGT EMP RELATIONS OTA	Oracle Training Administration
CIVDOD MNGT EMP RELATIONS	Oracle Government HR
CIVDOD OTA FISC OFF	Oracle Training Administration
CIVDOD OTA MNGR/SUPV	Oracle Training Administration
CIVDOD OTA ORG TRN MONITOR	Oracle Training Administration
CIVDOD OTA PERSONNELIST	Oracle Training Administration
CIVDOD OTA TRN ADM	Oracle Training Administration
CIVDOD PERSONNELIST	Oracle Government HR
CIVDOD PERSONNELIST OTA	Oracle Training Administration
CIVDOD PERSONNELIST OTHER	Oracle Government HR
CIVDOD PERSONNELIST OTHER OT.	Oracle Training Administration
CIVDOD REPORTS	CIVDODHR
CIVDOD RESOURCE MANAGER	Oracle Government HR
CIVDOD Resource Manager 2	Oracle Government HR
CIVDOD STAFFER	Oracle Government HR
CIVDOD STAFFER OTA	Oracle Training Administration
CIVDOD SUPERVISOR	Oracle Government HR
CIVDOD SUPR OTA	Oracle Training Administration
CIVDOD SYSADM HR MANAGER	Oracle Government HR
CIVDOD SYSADMIN REGION GUI	System Administration
CIVDOD TRAINER	Oracle Government HR
CIVDOD TRAINER OTA	Oracle Training Administration
CIVDOD US GOV NAF MGR	Oracle Government HR
CIVDOD VSB REPORTS	Oracle Government HR

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## Roles and Responsibilities, Continued

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**Personnelist** Personnelists are individuals with human resource management responsibilities, such as a classifier, personnelist, or OTA personnelist.

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**Access** Personnelists:

- At a Regional Service Center (RSC), will normally be given access to records of all employees serviced by their Regional Center or for their own servicing assignment.
- At a Customer Service Unit (CSU), will normally be given access to only those records of employees at their installation or serviced by their CSU.
- Will normally be given access to all parts of the modern DCPDS. Some RSCs and CSUs may limit access to menus, forms, reports, and data by personnel specialization.
- May approve an RPA, while others may not. It depends on each Component's business practices. This role, or level of permission, is independent of the responsibility the individual uses.

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### Personnel Specialty Access

Specialty	Area Access
Classification	Position areas related to building positions and COREDOCs, and other position management tasks.
Employee Development and Training	Oracle Training Administration (OTA) and Special Information (SIT).
Employee Management Relations	Benefits area related to performance management, pay, benefits and entitlements, hours of work, work schedules, leave and absences, discipline and adverse actions, and injury and unemployment compensation. This includes dues withholding, Bargaining Unit Status (BUS) codes, Union time reporting, and Complaints Tracking (if located in HR). May have Special Information (SIT) and Person/Extra Information.
Staffing	Areas related to filling positions, Resumix, and completion of Requests for Personnel Actions (RPAs).

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## Roles and Responsibilities, Continued

### Personnel Specialty Access (continued)

Specialty	Area Access
Personnelist	A generalist who has a combination of Classification, EMR, and/or Staffing functions.
System Administrator	Provides appropriate system capability to include creation of user accounts and assignment of responsibilities (menus).
Local Nationals (LN)	Areas related to LN positions and employees under the LN system.
National Guard Bureau (NGB)	Areas related to NGB positions and employees under the NGB system.
Non-Appropriated Fund (NAF)	Areas related to NAF positions and employees under the NAF system.

### Combination of Specialties

Personnelists with responsibilities under several specialties may be given access to areas and records (in the case of NAF or Generalists) that apply to all their specialties. This may involve such persons having more than one responsibility (menu) assigned to them.

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## Roles and Responsibilities, Continued

### Manager/ Supervisor

Managers and supervisors are individuals who manage or supervise civilian employees. In some organizations, this responsibility may include administrative staff who support management.

### Access

Based on their role, managers and supervisors can:

- View portions of records **for their own and subordinate employees within their hierarchical chain** (including their own record).
- View Payroll and leave data from DFAS.
- View Appraisals, current and historical.
- View Education, Licenses, Completed Training, etc.
- Initiate and authorize RPAs for positions and employees within their hierarchical chain for actions such as:
  - Promotions
  - Changes to lower grade
  - Awards
- Initiate and authorize Training Request Forms (TRFs) for employees.

### Other Users

Specialty	Area Access
Resource Manager	Ability to view basic data about the employee, view current and historical budget-related data, and have restricted viewing capability for a group of resource items. May also be given RPA role such as requestor.
OTA Fiscal Officer	Access to all cost information on individual, group, and total training costs. Does not have access to employee records. This could be a resource manager in the organization or an individual in the accounting and finance office.
EEO Official	Ability to enter and update in the EEO Complaints Tracking application and view only capability for People - Enter and Maintain.
EEO Management Representative	View only capability for the EEO Complaints Tracking application and People-Enter and Maintain.

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## Roles and Responsibilities, Continued

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### Other Users (continued)

Specialty	Area Access
External User	Access for a military supervisor of civilian employees or a personnelist located at a region who performs personnel servicing duties for a region other than the one which assigned as an employee. Access for a military supervisor would be the same as manager/supervisor.
OTA Organization Training Monitor	Access to training records and reports for their assigned organization. Access to the Bulletin Board and Course Evaluations. Capability of completing the Training Request Forms, Printing DD Forms 1556, and accessing the Enrollment Window.
VSB Reports	Ability to request a large variety of user-requested reports. Normally given as an additional responsibility.

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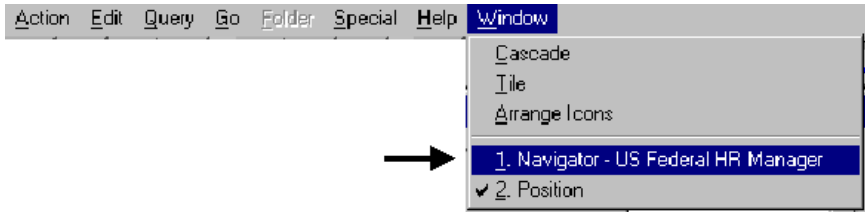



# Switching Your User Responsibility

**Purpose** If you have been assigned more than one *user responsibility* and, while you are logged on to the modern DCPDS, you wish to work under a different responsibility, you can do so without exiting the modern DCPDS and logging on again.

**Term** **Responsibility:** A set of access privileges for using the modern DCPDS. When a system administrator establishes your user account, you will be assigned one or more “responsibilities” so that you can access only those functions, forms, and data appropriate to do your job.

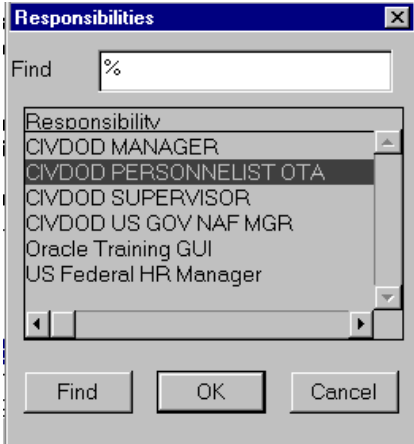
**How to Switch Your User Responsibility** Follow the procedures below to switch your user responsibility after you have logged on under a different responsibility:

Step	Action
1	<ul style="list-style-type: none"> <li>Click in the <b>Navigator</b> Window.</li> <li><i>Or</i></li> <li>If you are in another window, click <b>Window</b> → <b>Navigator</b> from the Main Menu Bar.</li> </ul> <p>◆ <b>Example:</b></p> 
2	<p>Now that you are in the <b>Navigator</b> Window:</p> <ul style="list-style-type: none"> <li>Click the Switch Responsibility button on the Toolbar: .</li> <li><i>Or</i></li> <li>Click <b>Special</b> → <b>Switch Responsibility</b> from the Main Menu Bar.</li> </ul> <p>If you have other windows open that have unsaved changes, a <b>Save Changes</b> Window will display, asking you if you want to save the changes you have made.</p> <p>All open windows will close except the <b>Navigator</b> Window, and a list of the responsibilities to which you have access will display.</p>

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## Switching Your User Responsibility, Continued

### How to Switch Your User Responsibility (continued)

Step	Action
3	<p>Click the responsibility you wish to switch to, and then click &lt;OK&gt;.</p> <p>◆ <b>Example:</b></p> 
	<p>The <b>Navigator</b> Window title and contents will now reflect the new responsibility.</p>

# Changing Your Password

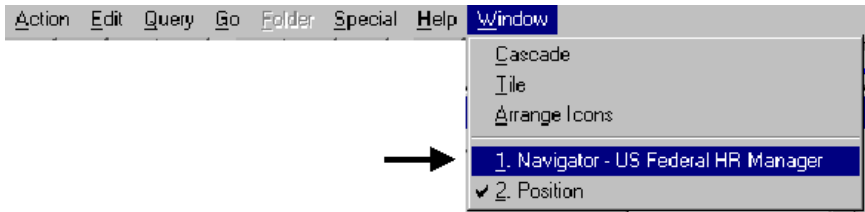
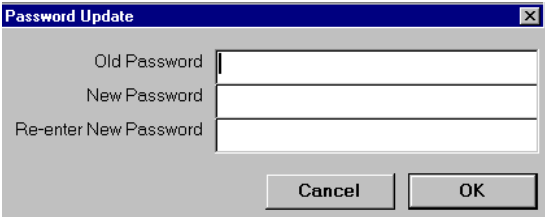
## Purpose

At times it will be necessary to change your log-in password:

- When you are first assigned access to the modern DCPDS, if you have been initially assigned a random password.
- If you know or suspect someone else has learned your password.
- As a matter of security procedures, you will periodically; e.g., every 90 days, be required to change your password.
- Or you may choose to change it if you have difficulty remembering your password.

## How to Change your Password

Follow the procedures below to change your log-on password:

Step	Action
1	<ul style="list-style-type: none"> <li>• Click in the <b>Navigator</b> Window.</li> <li><i>Or</i></li> <li>• If you are in another window, click <b>Window</b> → <b>Navigator</b> from the Main Menu Bar.</li> </ul> <p>◆ <b>Example:</b></p> 
2	<p>Now that you are in the <b>Navigator</b> Window:</p> <p>Click <b>Special</b> → <b>Change Password</b> from the Main Menu Bar.</p> <p>The <b>Password Update</b> Window will display:</p> 
3	<p>Type your current password in the <b>Old Password</b> data field.</p> <p>As you type in your password, the asterisk symbol (*) will display in place of the characters you are typing (as a security precaution).</p>

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## Changing Your Password, Continued

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### How to Change your Password (continued)

Step	Action
4	Press [ <b>Tab</b> ] once to move your cursor to the <i>New Password</i> data field, and type in the new password you wish to use.
5	Press [ <b>Tab</b> ] once to move your cursor to the <i>Re-enter New Password</i> data field, and type in your new password again.  If the second entry of your new password does not match the first, a window will display asking you to “try again” (re-enter your new password).
6	Click < <b>OK</b> >. Your new password takes effect immediately.

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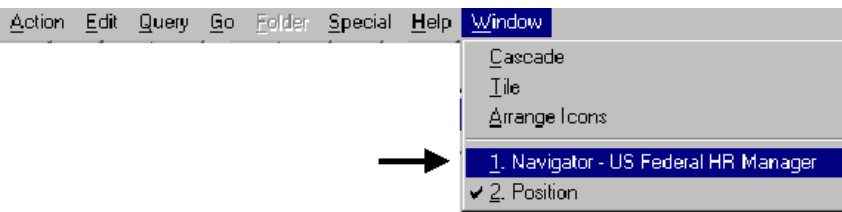
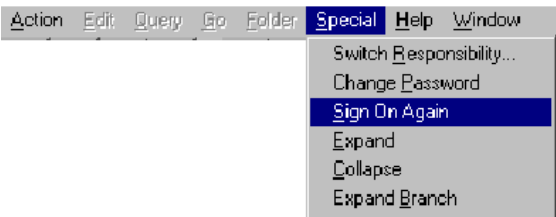
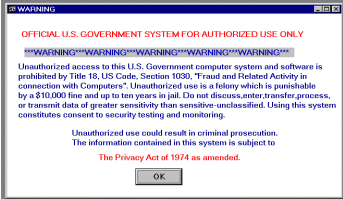
# Logging On as a Different User

## Purpose

If you have been assigned more than one User ID and password, then you can log on again as a different user from within the modern DCPDS (without having to log off first).

## How to Log On as a Different User

Follow the procedures below to log on again as a different user while you are in the modern DCPDS.

Step	Action
1	<ul style="list-style-type: none"> <li>Click in the <b>Navigator</b> Window.</li> <li><i>Or</i></li> <li>If you are in another window, click <b>Window</b> → <b>Navigator</b> from the Main Menu Bar.</li> </ul> <p>◆ <b>Example:</b></p> 
2	<p>Now that you are in the <b>Navigator</b> Window:</p> <ul style="list-style-type: none"> <li>Click <b>Special</b> → <b>Sign On Again</b> from the Main Menu Bar.</li> </ul> 
3	<p>A <b>Warning</b> Window is displayed. Read the <b>Warning</b> Window notice and click &lt;OK&gt;.</p> 
4	<p>A log on window displays.</p> <p>Type in your user name and password for your other sign-on (following the regular log-on procedures) and then click [<b>C</b>onnect].</p>

# Exiting the Modern DCPDS

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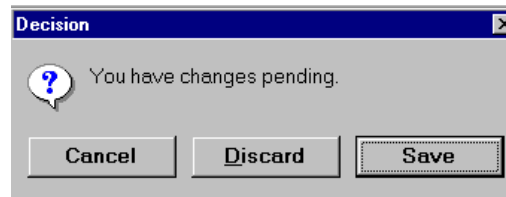
## Purpose

When you have finished working in the modern DCPDS, you will need to follow a simple procedure to exit the application. If you have any unsaved work, the system will prompt you to save or discard the changes.

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## How to Exit the Modern DCPDS

- Click **A**ction → **E**xit Oracle Applications from the Main Menu Bar.
  - If there is **no** unsaved work, the modern DCPDS exits and returns you to your desktop.
  - If there **is** unsaved work, then a dialog box will display:

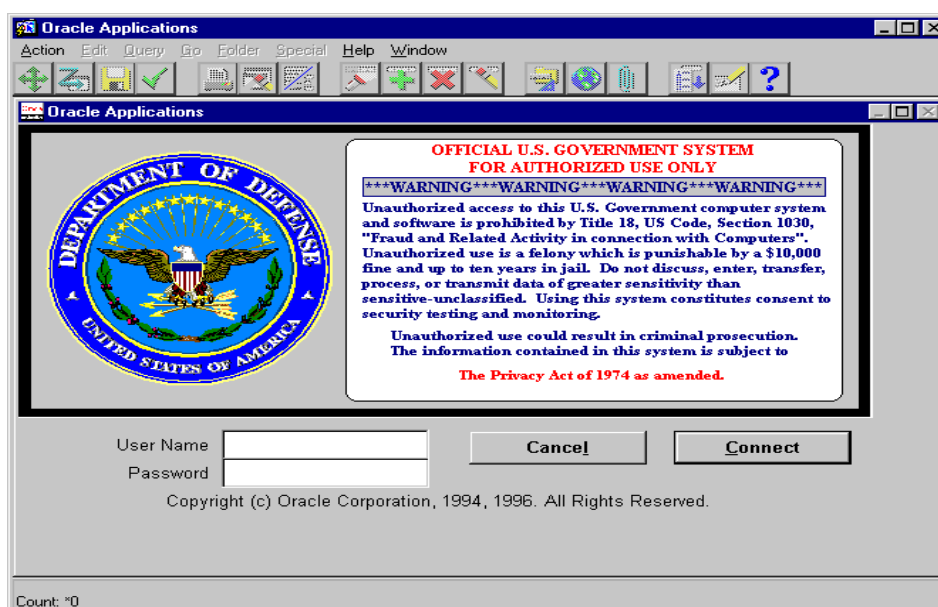


- Click <**S**ave> to save the changes before exiting.  
*Or*
  - Click <**D**iscard> to exit without saving any changes.  
*Or*
  - Click <**C**ancel> to close this window and cancel the exit.
-

# Security in the Modern DCPDS

**Introduction** Security for the modern DCPDS is the responsibility of each user authorized to access the system. The Oracle Human Resources (HR) application has inherent security within the application in addition to the mandatory security requirements of DoD. Security is a major responsibility of the system administrator at the RSC and CSU, as well as security personnel at all levels within a Component. Additionally, security uses “roles and responsibilities” to limit your access to the modern DCPDS. DoD, Components, and local installations issue security policy and guidance. It is your responsibility to provide the necessary security to protect the modern DCPDS information in accordance with current regulations and guidance.

**Privacy Information** Information created and stored within the modern DCPDS is UNCLASSIFIED FOR OFFICIAL USE ONLY and is subject to the Privacy Act of 1974. Every user of the modern DCPDS must adhere to the Privacy Act when working with any information that relates to the data contained in the modern DCPDS. The following warning screen on unauthorized use of your computer displays once you access the modern DCPDS from your workstation. By signing on with your *User Name* and *Password*, you acknowledge your consent to security testing and monitoring of your computer.



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## Security in the Modern DCPDS, Continued

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<b>Importance of Security</b>	Security is important to you as the user because the modern DCPDS database contains personal data on DoD personnel that, according to Operational Requirements and DoD Directives, must be safeguarded at all times. Unlawful use of the information contained in the database by you or an unauthorized user is a crime and punishable to the full extent of the law. Therefore, safeguarding information and access to the modern DCPDS database is of paramount importance.
<b>Controlling Access</b>	Management and the Information System Security Officer (ISSO) or the HR system administrator at the RSC or CSU determines access to the modern DCPDS based on your role and responsibilities within the organizational hierarchy and your “need to know.” A unique <i>Username</i> and <i>Password</i> is assigned to you based on your role and responsibility within the organization.
<b>Secure Users</b>	The Systems Administrator is responsible for establishing a Secure User ID for each person that needs access to specific Oracle forms with the modern DCPDS application. The Secure User View will allow viewing of only those records based on organization or position hierarchy within one’s assignment.
<b>Individual Responsibility</b>	You, as a modern DCPDS user, must protect your individual <i>User Name</i> and <i>Password</i> to prevent any unauthorized access. It is your responsibility to attend security training, report changes in your user status, any suspected security violations, etc., to the designated management authority, ISSO, or HR system administrator. You may be required to sign a statement to acknowledge your understanding of these responsibilities and the consequences.
<b>Changing Passwords</b>	As a continuing security measure, <i>Passwords</i> must be changed on a periodic basis to help prevent the possibility of undetected password compromise. The maximum time limit established by the system is 90 days. Prior to the expiration date you will be notified automatically by the application to change your <i>Password</i> . At that time, simply follow instructions on the monitor to execute a new <i>Password</i> .
<b>Log on Attempts</b>	The modern DCPDS will allow you three attempts to successfully log on. If three attempts result in an unsuccessful log on, the application will automatically terminate. You will need to re-access the system.

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# Routing Lists

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## Purpose

A Routing List:

- Is a predefined list of routing destinations for sending notifications to Civilian Inboxes.
- Defines the order in which a personal inbox or Groupbox receives a workflow notification.
- Expedites routing HR windows by automatically forwarding a form from one routing destination to the next.

Workflow allows you to route forms to either groups or individuals who need to approve, modify, or review the forms; e.g., Request for Personnel Actions (RPAs) (including those with Core Documents attached).



**Note:** Training Requests Forms (TRFs) from the Oracle Training Administration (OTA) are not routed to Civilian Inboxes in the same method as HR forms. There is no routing list for OTA. You must select the name of the person and route to their Civilian Inbox.

Workflow features include:

- A flexible routing mechanism.
- A flexible notification system.
- Powerful Inbox and Groupbox capabilities.
- A complete tracking history of an RPA and TRF during the routing process.

## See Also



Module 1, Fundamentals of the Modern DCPDS

Chapter 10, Civilian Inbox

Module 3, Processing Requests for Personnel Actions in the Modern DCPDS

Chapter 2, Accessing Requests for Personnel Actions

Module 7, Employee Training and Development

Chapter 2, Administering Training

Oracle Help Menu

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## Routing Lists, Continued

### Before you Begin

Components will determine procedures for each Region in establishing Routing Groups. The following is information on the process.

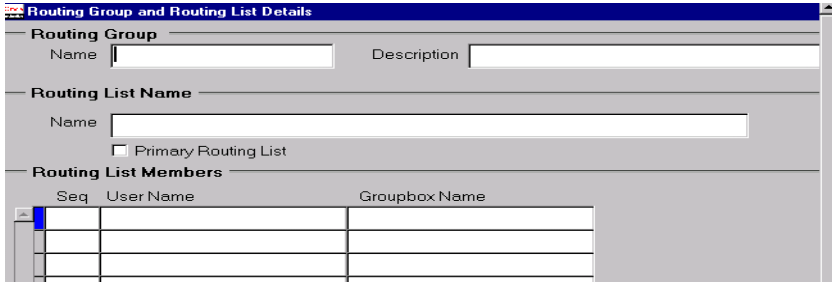
- A Routing Group is set up at each region when the modern DCPDS deploys.
- A Routing List is created for a Routing Group in the **Routing Group and Routing List Details** Window.
- Before adding a user to a Routing List, the user must have system access and belong to a Routing Group.
- Multiple Routing Lists for a Routing Group may be created.
- Users may belong to more than one Routing List.



**Note:** You must be assigned the role of a Systems Administrator on the **Responsibilities** Menu to create Routing Lists. You can also create a Routing List if you are assigned the CIVDOD MANAGER responsibility. Click *Routing Lists* on the **Navigation List** and follow the procedures below.

### Creating A Routing List

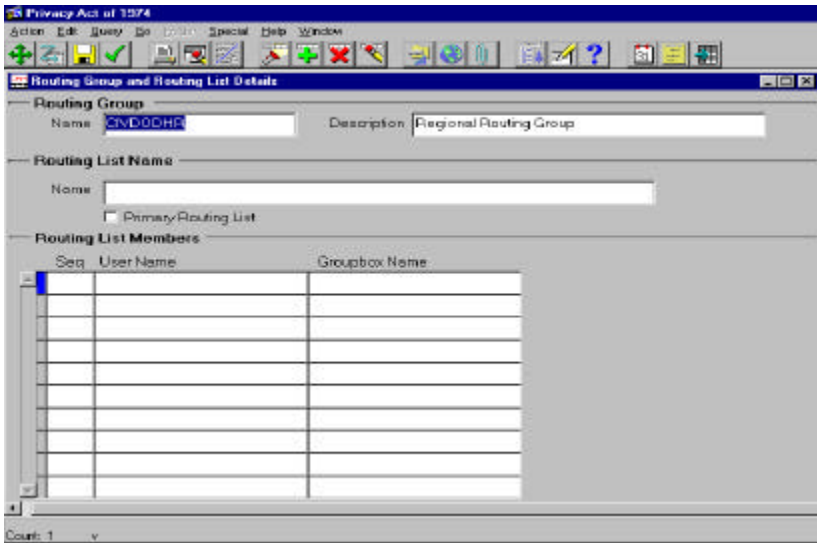

Follow the procedures below to create a Routing List, if you are assigned this responsibility.

Step	Action
1	<p>On the <b>Navigation List</b> → <i>Federal Maintenance Forms</i> → <i>Routing List</i> → <b>&lt;Open&gt;</b>. The <b>Routing Group and Routing List Details</b> Window displays.</p> 

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## Routing Lists, Continued

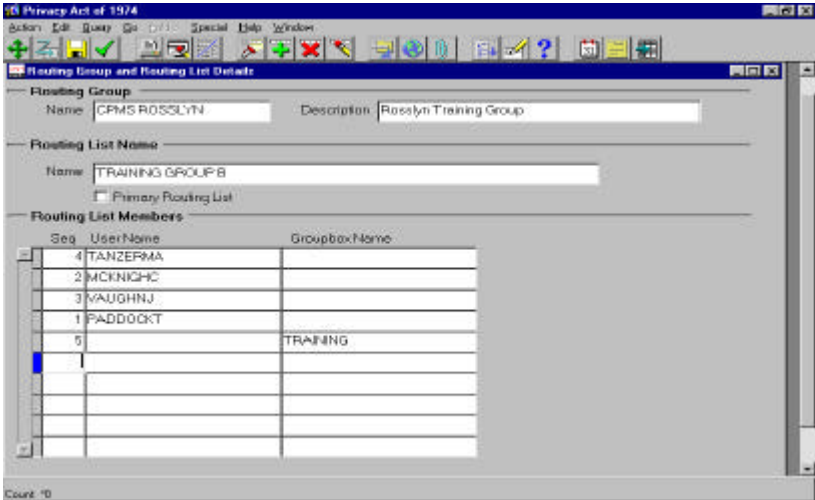
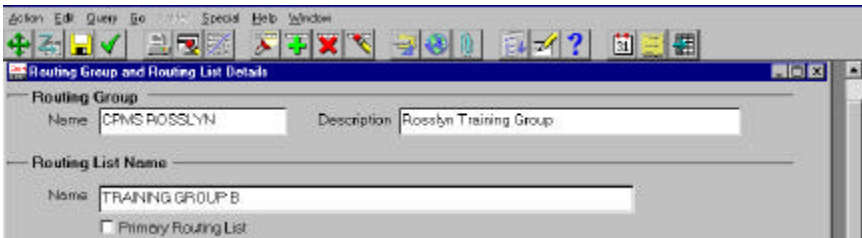
### Creating A Routing List (continued)

Step	Action
2	<p>Place your cursor in the <b>Name</b> data field of the <b>Routing Group</b> Region. Query for a listing of Routing Groups by clicking <b>Query</b> → <b>Find</b>. You can also execute a query by pressing F8. This displays the Routing Group in the <b>Name</b> data field. Use the up and down arrow keys to review the lists of Routing Groups. Select the Routing Group that you want to create a Routing List for or to add new users.</p>  <p>➔</p> <p> <b>Note:</b> The message line indicates there is more than one Routing Group. Use the arrow keys to scroll through the Routing Groups and make a selection.</p>

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## Routing Lists, Continued


### Creating A Routing List (continued)

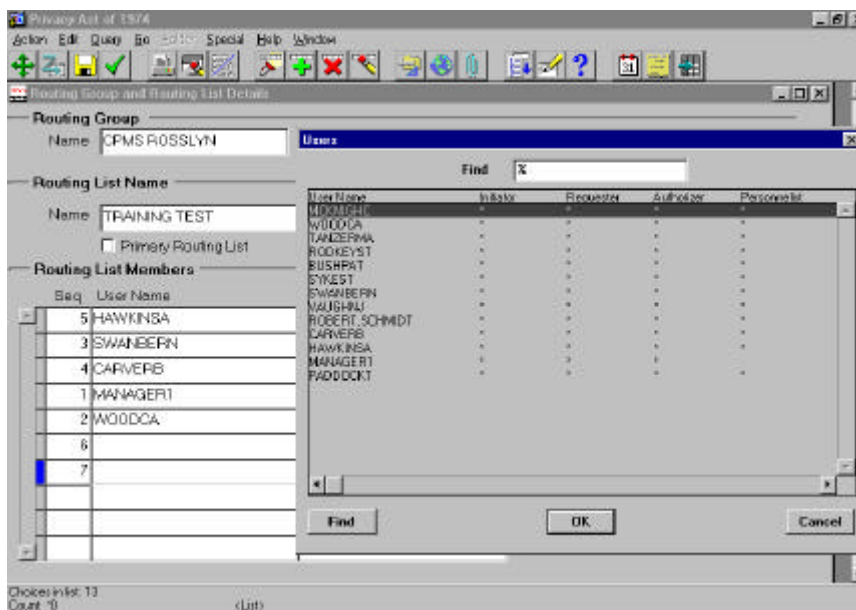
Step	Action
2 (cont)	<p>If you previously created a Routing List for the Routing Group, the system displays that information with specific user names listed.</p> 
3	<p>Place your cursor in the <b>Routing List</b> Region, <i>Name</i> data field and type in the name of your Routing List, if known or type in the name of a new Routing List that you want to create.</p> 
4	<p>Place an "X" in the <b>Primary Routing List</b> check box if this is to be the Primary Routing List. Normally, you will leave this box unchecked.</p>

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## Routing Lists, Continued

### Creating a Routing List (continued)

Step	Action
5	In the <b>Routing List Members</b> Region, input a number in the first <b>Sequence (Seq)</b> Column; e.g., 1, 2, 3, etc. You can change the sequence numbers later, if necessary.
	<b>Note:</b> The sequencing numbers represent the order for routing an RPA.
6	Tab to the <b>User Name</b> Column. Input the user names, or use the List of Values (LOV) to select the names. If you use the LOV, the <b>Users</b> Window displays. Select the name and click <b>&amp;ltOK&gt;</b> .



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Action Edit Query Go Editor Special Help Window

Routing Group and Routing List Details

Routing Group

Name CPMS ROSSLYN

Routing List Name

Name TRAINING TEST

☐ Primary Routing List

Routing List Members

Seq	User Name
5	HAWKINSA
3	SWANBERN
4	CARVERB
1	MANAGER1
2	WOODCA
6	
7	

Choices in list: 13  
Count: 0

(List)

Users

Find %

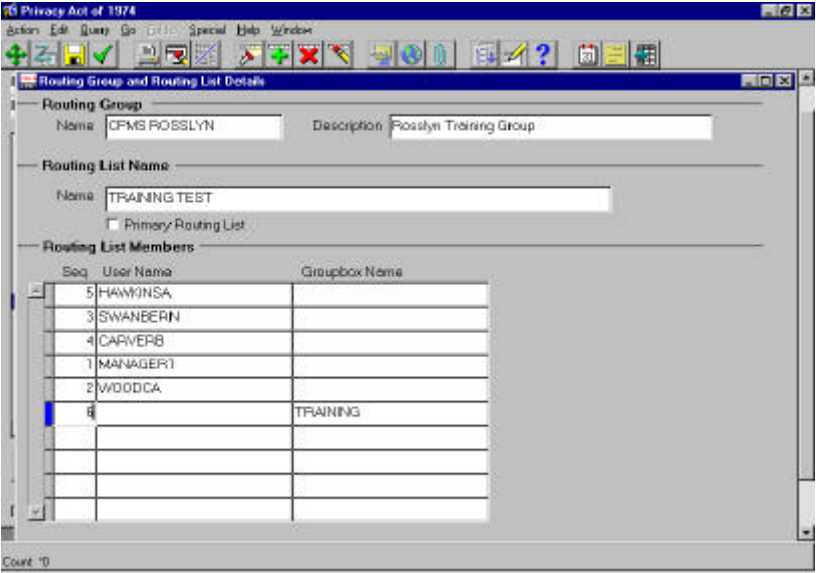
User Name	Initials	Position	Department
WOODCA			
TANZERRA			
RODKEYST			
BUSHPAT			
SYNEST			
SWANBERN			
NAUGHLI			
ROBERT SCHMIDT			
CARVERB			
HAWKINSA			
MANAGER1			
PADDOCKT			

Find OK Cancel

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## Routing Lists, Continued

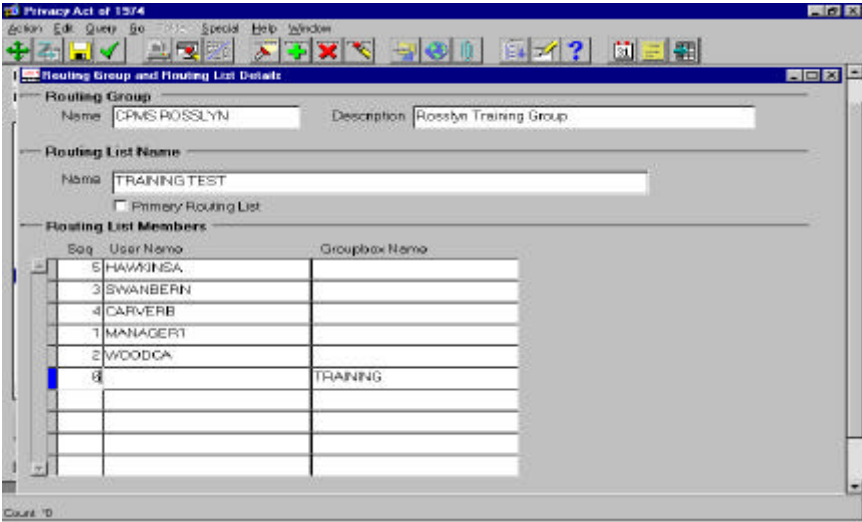


### Creating A Routing List (continued)

Step	Action
7	<p>The name selected populates the <i>User Name</i> column.</p> 

*Continued on next page*

## Routing Lists, Continued


### Creating A Routing List (continued)

Step	Action
8	<p>Continue with new sequence numbers and additional users until you are finished.</p>  <p> <b>Note:</b> If you do not enter a user name in the second column, you may enter a Groupbox name in the third column. You may enter a Groupbox name or a user name in each row, but not both.</p>
10	<p>Save the <b>Routing List</b>.</p> <p> <b>Note:</b> You may want to only include Groupboxes as members of a Routing List. If a user ceases employment and their User Name is not removed from the Routing List, RPA's will still go to that User's Inbox and not to the next person's on the Routing List. This is true even if the former employee's User Account has been inactivated.</p>

*Continued on next page*


## Routing Lists, Continued

### Removing a User from the Routing List

Step	Action
1	On the <b>Routing Group and Routing List Details</b> Window, in the <b>Routing List Members</b> Region, select a user and click <b>Delete Record</b>  on the Toolbar. The user name is deleted.
2	Click <b>Save</b> .

### Adding Multiple Routing Lists to a Routing Group

Components with only one Routing Group at the Region may need to add more than one Routing List to their Routing Group. Use the following procedures to add additional Routing Lists to the Routing Group.

Step	Action
1	In the <i>Name</i> data field of the <b>Routing List Name</b> Region, click <b>New Record</b> on the Toolbar.
2	Enter the name of the new Routing List. Check the primary routing list box, if this will be a primary routing list.
3	Enter the user names.
4	Click <b>Save</b> after all users and Groupboxes have been added.
5	Repeat this process for each Routing List required. Additional Routing Lists may be added to the Routing Group at any time.
6	<p>Close the <b>Routing List</b> Window and return to the <b>Navigation List</b>.</p> <p> <b>Note:</b> For additional information, click <b>Help</b> on the Main Menu Bar for information additional information on Routing List, etc.</p> 